

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

**24. Maintain Contracting Office Personnel
Assignment**

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| 24.1 | Introduction | This procedure describes how to maintain the various roles of personnel within a contracting office. Once a contracting office has been established in the system, the administrator for that contracting office identifies: 1) the personnel associated with that office, and 2) each person's role(s) (i.e., whether they are a buyer, a contracting officer, an expeditor and/or an administrator). The contracting office personnel assignment data is entered via the CSPS "Contracting Office Personnel Assignment Screen" (PR601). |
| 24.2 | Who Performs the Procedure | The contracting office administrator will be responsible for entering and maintaining the personnel (and their roles) associated with his/her contracting office. |
| 24.3 | Initiating the Process | The contracting office personnel assignment information is entered when the personnel or the roles of the personnel within the contracting office change. Each contracting office is responsible for identifying the roles of each individual within their organization and providing such information to the procurement module administrator. |
| 24.4 | Accessing the System | From the Main Menu, select Maintenance. From the Maintenance menu, select Procurement. From the Procurement menu, select "PR601- CO Personnel Assignment". Follow the steps below for PR601. |

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- 24.5 Adding a New Employee to the Contracting Office** This procedure describes the steps necessary to add a new employee to the contracting office.

PR601 - Contracting Office Personnel Assignment Screen

STEP	ACTION
EMPLOYEES CONTROL BOX	
1.	In the EMPLOYEES box, place the cursor on a blank line. A list of all the employees in the system that have not been associated with a contracting office will appear.
2.	Select the employee to be added to this contracting office. Click "OK".

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STEP	ACTION
3.	<p>In the CONTG field, click the field using the mouse or press the space bar if the new employee is a contracting officer. If the new employee is not a contracting officer, leave this field blank.</p> <p>Note: If the CONTG field is checked, the system will automatically check the BUYER field. The system assumes that all contracting officers can also act as buyers within their contracting office.</p>
BUYERS CONTROL BOX	
4.	<p>In the BUYER field, click the field using the mouse or press the space bar if the new employee is a buyer. If the new employee is not a buyer, leave this field blank.</p> <p>Note: If this employee is a buyer but not a contracting officer, go to 'Step a' to associate the buyer with a contracting officer. Otherwise, proceed to Step 5.</p> <ol style="list-style-type: none"> a. Place the cursor on the contracting officer to be associated with the buyer. b. In the BUYERS box, place the cursor on a blank line. A list of all the buyers in the system that have not been associated with a contracting officer will appear. <p>Note: The new employee should be included in this list.</p> <ol style="list-style-type: none"> c. Select the buyer to be associated with the contracting officer.
5.	<p>In the EXPED field, click the field using the mouse or press the space bar if the new employee is an expediter. If the new employee is not an expediter, leave this field blank.</p>
6.	<p>In the ADMIN field, click the field using the mouse or press the space bar if the new employee is an administrator. If the new employee is not an administrator, leave this field blank.</p>

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- 24.6 Removing an Employee from the Contracting Office** This procedure describes the steps necessary to remove an employee from the contracting office.

STEP	ACTION
1.	In the EMPLOYEES box, place the cursor on the employee to be removed from the contracting office.
2.	Click the “Delete Record” (i.e. Red ‘X’) icon on the toolbar to remove the employee. A message confirming the deletion will appear on the screen. Click “OK” to confirm the deletion or click “CANCEL” to cancel the deletion process.

- 24.7 Changing an Employee’s Role(s)** This procedure describes the steps necessary to change an employee’s role(s) within the contracting office.

STEP	ACTION
1.	In the EMPLOYEES box, place the cursor on the employee whose role(s) will be modified.
2.	If the employee will be performing one or more new roles, click the applicable field using the mouse or press the space bar to enter a check for each new role. If the employee will no longer be performing one or more roles, click the applicable field using the mouse or press the space bar to uncheck the field.

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- 24.8 Printing (Running) the Procurement Roles Report.** This procedure describes the steps necessary to run the “PR707 - Procurement Roles” report.

PR707 - Runtime Parameter Form (Procurement Roles)

PR707: Runtime Parameter Form

File Edit Help

Previous Next Run Report Cancel

PR707

PROCUREMENT ROLES

Enter values for the parameters below

Destination Preview

Contracting Office Code ALL

STEP	ACTION
1.	<p>To run the “PR707 - Procurement Roles” report,</p> <p>a. Click on the “Printer” icon found on the toolbar while the Contracting Office Personnel Assignment Screen (PR601) window is open and active,</p> <p style="text-align: center;">or</p> <p>b. From the Main Menu, select Reports. From the Reports menu, select Procurement. From the Procurement menu, select “PR707 - Procurement Roles”.</p>
PR707: Runtime Parameter Form	

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STEP	ACTION
2.	<p>To select the destination of the report, click the pull down menu in the DESTINATION field and select the appropriate destination:</p> <ul style="list-style-type: none">a. To view the report on the screen, select “Screen”.b. To send the report to a specific file, select “File”.c. To send the report to the printer, select “Printer”.d. To send the report to a mail file, select “Mail”.e. To view the report on the screen, select “Preview”. <p>After selecting the destination, go to Step 3.</p>
3.	<p>To select the contracting office code for the report, click the pull down menu in the CONTRACTING OFFICE CODE field and select the appropriate contracting office code.</p> <p>Note: To run a report for all contracting office codes, select “All”.</p>
4.	<p>Click the “RUN REPORT” pushbutton to execute the selection made. Proceed to Step 6.</p>
5.	<p>Click the “CANCEL” pushbutton to cancel the report selections made.</p> <p>Note: Upon clicking the “CANCEL” button the Runtime Parameter Form will close and exit the user to the last active screen.</p>

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STEP	ACTION	
	IF...	THEN...
<p>6.</p>	<p>The destination selected is “Screen” or “Preview”...</p> <p>and</p> <p>The “RUN REPORT” pushbutton is clicked...</p>	<ul style="list-style-type: none"> a. To go to the next page of the report, click the “NEXT” pushbutton. b. To go to the previous page of the report, click the “PREV” pushbutton. c. To go to the last page of the report, click the “LAST” pushbutton. d. To go to the first page of the report, click the “FIRST” pushbutton. e. To go to a specific page of the report, enter the page number and then click the “PAGE” pushbutton. f. To print the report, click the “PRINT” pushbutton. g. To send the report to a mail file, click the “MAIL” pushbutton. This functionality is currently not available. h. To close the report, click the “CLOSE” pushbutton. i. To open a second report window, click the “NEW” pushbutton.